Client Services 4.1.3

CIMS Release Notes

November 2005

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Questions?
Uncertain if CIMS is working correctly?

Call the Help Desk:

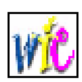
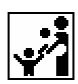
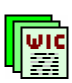
1 - 800-942-2484
(Eastern WA)

1 - 888-457-2467
(Western WA)

These notes are available as “What’s New” in Client Services under the Help menu.

CIMS Central

CIMS Central was removed due to security concerns and problems for clinics with check-in/check-out satellite sites. Staff will now see 2 icons on the desktop:

		deleted	
	**Client Services**	replaces	
	**Clinic Reports**	replaces	

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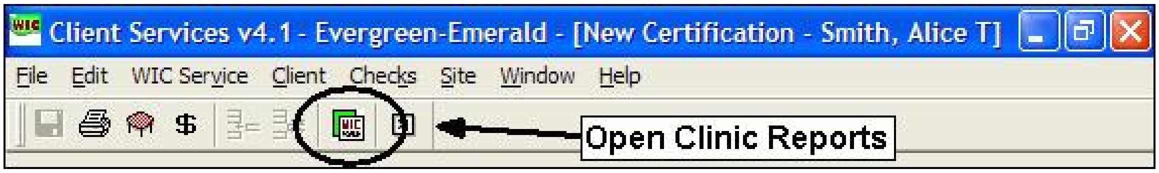
Clinic Reports can be accessed directly from Client Services (without having to logon again) with a new button on the toolbar.



It can also be opened by using the new icon on the desktop.

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Purpose of the New Release

A new version of Client Services has been developed to make it compatible with the upgraded changes to the CIMS database. This version includes improvements in performance (i.e. speed), data integrity and security. In addition, over 25 bugs reported in earlier versions have been fixed.

You'll see changes in the 'look and feel' of Client Services that were made to meet Microsoft Windows standards. You'll probably notice that some of the new toolbar buttons look and act the same as buttons in other computer programs you use.

Note: All references to color are based on the Microsoft Theme *Windows XP*, Windows and Buttons *XP Style*, color scheme *default (blue)*. If you have changed your colors or theme, please change back to the Windows XP standard defaults.

Global changes throughout Client Services:

- The initial Logon takes noticeably longer than before. This is because more of the Client Services program is being loaded into your computer from the server. The net change is Client Services will run faster after the initial logon.
- Color changes
  - Historic information that can't be edited or changed is displayed as black text on a sand background (previously "aqua" fields).
    Examples: Contact Date (Demographics tab), previous referrals (Referrals tab).
  - Information gathered and maintained elsewhere in Client Services or calculated from other collected data is displayed as white text on a blue background.
    Examples: Client names (Flowsheet tab), age, BMI (wizard tabs).
- The blue banner at the top of each window displays information in this order: Computer Program Name and version - Agency - Clinic Site – [Contact Type - Client Name].
  Example: Client Services v4.1.3 - Evergreen CHD – Emerald – [Second Contact – Smith, Anna T]
- Version numbers will now consist of 3 numbers, separated by decimal points. For example, this version is 4.1.3. On the About Client Services screen in the Help menu the "build" number is also listed, so the number appears like this: 4.1.3.050526.
- Toolbar buttons that can't be used in the current window are unavailable (grayed out).

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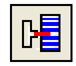
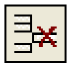
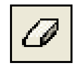
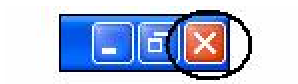
- Toolbar buttons were changed as part of the standardization effort.

New button	Function	Old button
	Add row or record	
	Delete row or record	
	Open Clinic Reports	

- The exit button was removed from the toolbar. To close Client Services, click on the white X in the red box in the upper right corner of your computer screen.



This X in the upper right corner of your screen closes Client Services.

The Exit button was removed to avoid accidentally closing out of Client Services.

- Message boxes throughout Client Services had their wording and grammar changed to make the messages easier to read and understand.
- Client Services was made more efficient, so moving from tab to tab or window to window is faster. You should be able to notice the improvement.
- A previous problem that caused Client Services to crash when trying to click on a tab or field before the current page is loaded has been fixed. When you click on a tab, all other tabs are unavailable until the selected tab is completely loaded. You probably won't notice this because with the faster Client Services, there's actually less wait time.
- For multi-site clinics, the Site drop-down menus now display your sites in alphabetical order. *Examples:* Change Site, No Show Management.
- Only one wizard can be opened at a time *for an individual client* on the same computer.
- Client Services will now shut down automatically if no activity has taken place for two hours or more.
  If you are leaving your desk for a significant period of time, be sure you have saved any work you have done. If you are leaving for the day, close Client Services. The application will automatically shut down after two hours of inactivity, and any information that has not been saved will be lost.

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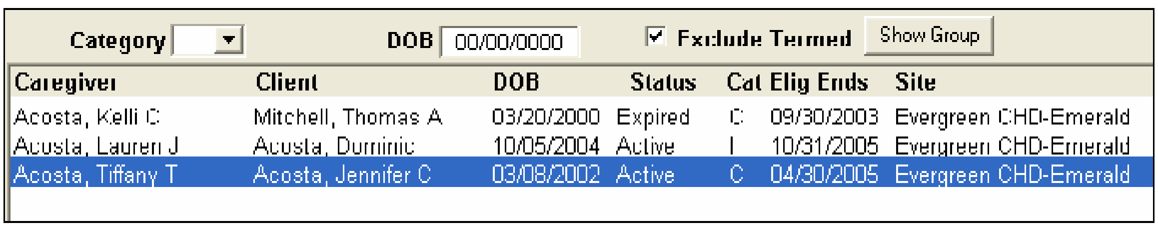
Desktop

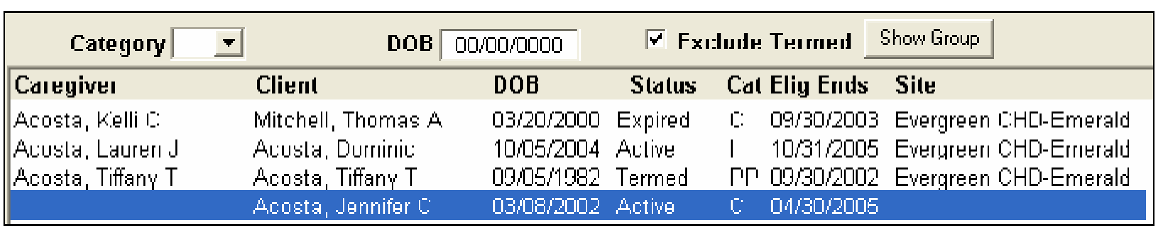
Find Client

- The Active Only option was changed to “Exclude Termed.” When this box is checked, all clients with a status of Active, Enrolled, Expired, Pending, Presumed and RC in Process are shown. No Terminated clients for any group will be shown.
- Exclude Termed must be selected before clicking the Find button.
- When a find is completed with Exclude Termed selected, a Show Group button appears. To see all members of a group, highlight any client in the group and click Show Group. All terminated group members are added to the display. Double-clicking a client in the list will also display all members of that client’s group.

Example:



Find results using Exclude Termed



Same Find Results after Show Group button was clicked.

- Exclude Termed works <u>only</u> on the Find Client tab. Terminated group members will still be seen on the flowsheet, when making a new appointment, etc.
- **Caution:** If everyone in the group is Termed, the Show Group button will not be useful. Make sure you uncheck Exclude Termed when searching for groups with all members Termed.

Flowsheet

- The notes indicator in the Careplan was changed to a checkmark. 

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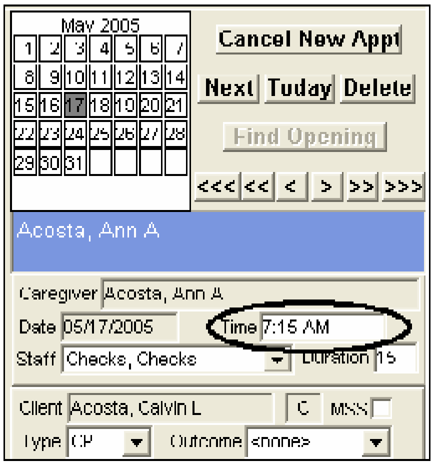
Appointment Book

- The appointment book window was lengthened by one hour. Instead of seeing 21 appointment time slots, you'll be able to see 25 time slots.
- The Appointment book day was extended by 2 hours. It now starts at 7am and ends at 9pm. The default time for 7 and 8 is "am", so be sure to change it to "pm" when setting up evening appointments.
  Example:



If you type any time from 7:00 to 11:45, and tab out of the Time field, the time is set automatically to "AM." From 12:00 to 6:45, the Time field defaults to "PM."

When making appointments from 7pm to 8:45pm, be sure to type the PM. Or, use the appointment schedule window and click in the appropriate time boxes.

- The coloring scheme for the Appointment Book has changed for easier reading:
  - Unavailable times are dark gray.
  - Completed appointments are black text on light gray.
  - Scheduled, but not yet completed, appointments are black text on light blue.
  - When making a new appointment, or clicking on an already scheduled appointment, the field turns blue and text turns white.
  - Double-booked appointments always display with the Completed color scheme.
- When the focus is on a selected Caregiver's last name in an appointment time slot, the name displays as white letters on a dark blue background.
- The first 8 characters of the class name now displays in the appointment book, rather than the term "DBLBOOK."

Classes

- The list of available classes was shortened to display all future classes and classes no older than one month.

Demographics

- Client and Caregiver name fields no longer allow blank spaces accidentally entered at the beginning of the name. Be sure to click or tab out of the field before leaving the Tab to ensure your information gets saved.
- Pregnant women now have their Due Dates displayed in the client information portion of the Demographics window.
- Fields were added to Address and Mailing address to record Zip + 4 information.

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WIC Service Wizards

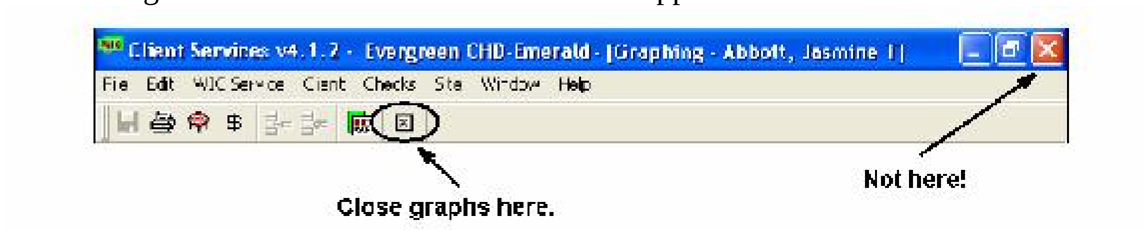
Only one wizard can be opened at a time *for an individual client* on the same computer.

- Void/Replace Checks is a wizard. You must Finish a WIC Service wizard for a client before you can void/replace checks for that client.

Graphs

- The Graph window has been changed. The main difference is that it is no longer closed with the corner X, but with the close window button.

    - To close the graph window, use the small x button on the toolbar.
    - **Do not use the white X in the red box** in the upper right corner of the window. The large red X will close the Client Services application.



- The auto-assignment of the overweight prenatal weight gain grid was corrected from pre-pregnancy BMI >26.0 to ≥ 26.1 to accurately match the auto-calculated nutrition risk factor.

Nutrition Risks

- The risk factor, "BF a WIC Eligible Infant", was inactivated and is no longer auto-assigned when changing from PP to BF.
- When changing a PP woman back to a BF woman, the BF risks

    Breastfeeding a Priority 1 Infant
    Breastfeeding a Priority 2 Infant
    Breastfeeding a Priority 4 Infant

  are not automatically assigned. A message box pops up with a reminder to add the appropriate BF risk factor.

Use the Change Cert Info wizard to add the correct BF risk factor.

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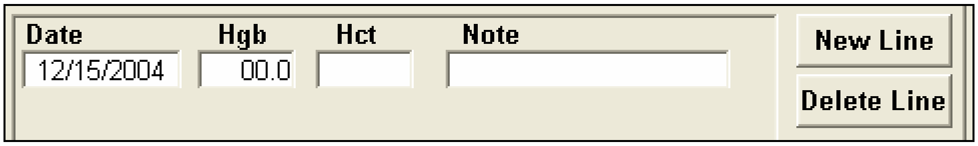
Hemoglobin/Hematocrit

- The boxes for hemoglobins and hematocrits were reversed, so hemoglobins appears before hematocrits.



This change was made because the majority of clinics now collect hemoglobins instead of hematocrits.

- When first tabbing into the hemoglobin field to enter data, the field displays 00.0. If the hgb is <10, you must enter the leading 0, or include a decimal point. (Example, you cannot enter 9, but you can enter "09" or "9.0".

WIC Client

Switch Groups

- When the Find button is used to display a list of Caregivers, the top row is highlighted and the Switch button is available. Previously, a row (including the top row) had to be clicked before the Switch button was made available.

Appointment History

- Detail information for a selected appointment now displays the name rather than ID number for all staff members, including inactive staff.

Contact History

- Detail information for a selected contact now displays the name rather than ID number for all staff members, including inactive staff.

Termination History (new)

- This window is the same as Terminate Client, except it is a view-only window. To terminate a client or print a termination letter, use Terminate Client.

Certification Encounter Report

- The correct percentile for Head Circumference is displayed.

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Checks

Void/Replace Checks
- You can now only use the pink arrows to move back and forth through the wizard. You cannot use the tabs at the top of each screen.
- The error that caused checks for the wrong months to print after going backwards on the screens has been fixed.
- If you go back to the beginning window, you will lose all your entered information except notes, and have to re-enter it.
- You will not be able to use void/replace checks if you have a WIC Service wizard open for the client. You must Finish the wizard before using Void/Replace Checks.

Batch Checks
- A potential double-issuance problem when using Void/Replace Checks to replace batch-produced checks prior to reconciling batch checks was fixed.

Record Handwritten Checks
- Recording of handwritten checks was made easier by alerting staff to errors before requiring staff to confirm they want to record checks.
- The field for recording the check number was limited to 10 digits (the number of digits on a handwritten check).

Mailed Check letter
- The Mailed Check letter was fixed to correctly print the Caregiver's address. A problem that occurred when the mailing address was deleted on the Demographics tab was fixed.

View Check Notes (new)
- This new function allows staff to view check notes for all clients in the group including terminated clients. It is view only; notes cannot be added, deleted, or edited in this window. To access this new feature, go to Checks on the menu bar and select Check Notes to view. To add, delete, or edit a check note, go to Check Pickup and select the Notes tab.

  Note: <u>These are check notes only.</u> To look at notes from any of the wizards, use the Notes tab in Client Certification History in the Client menu.

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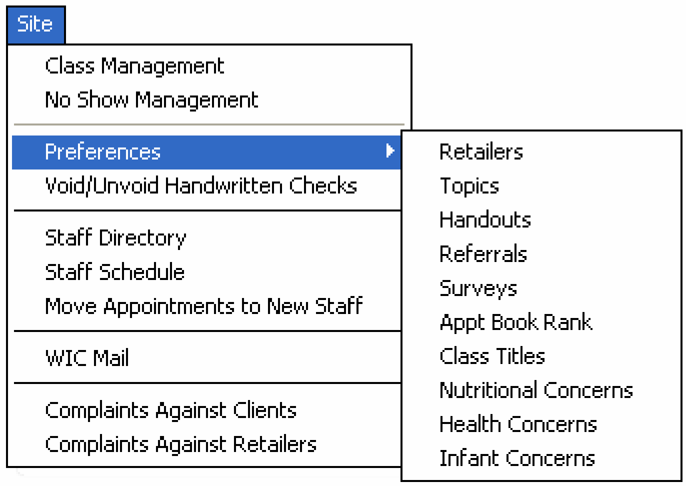
Site

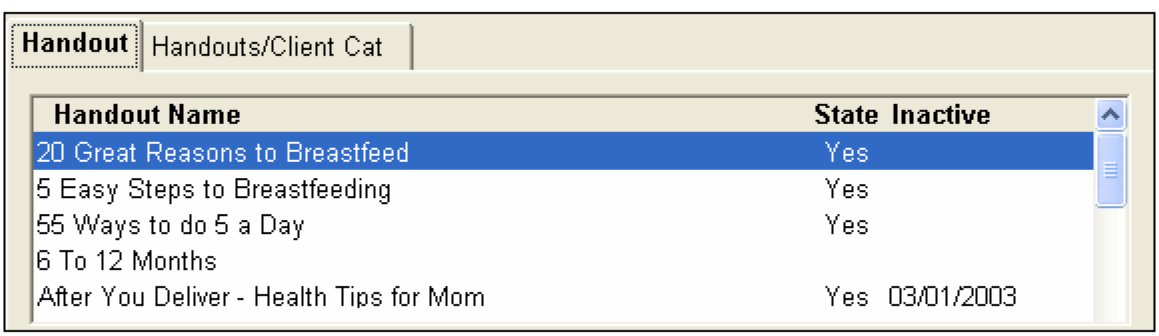
Preferences

- To make preferences easier to use, activities were split into separate windows.



- Each activity functions as before, but only the tabs related to the activity are seen.

  For example, to associate a Handout with a new client category, select Handouts. Both Handouts and Handouts/Client Category tabs become available.



- A bug that sometimes made topics, handouts, classes, etc., appear out of alphabetical order has been fixed.

- A bug that allowed staff to accidentally edit a topic, handout, class, etc., when adding a new one has been fixed.

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Move Appointments to New Staff

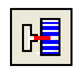
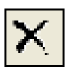
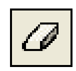
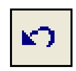
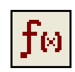
- When moving appointments for more than one day, you can identify the days, then move the appointments for each day separately without having to re-find the appointments.

  Previously, if you identified 3 days to move, selected a Move to Staff for only one day and Saved, the window would clear and you would have to re-identify the other 2 days again.

  Now, when you identify 3 days and move only one day, the remaining 2 days are still displayed for you to move.

WIC Mail

- Toolbar buttons were changed as part of the standardization effort.

New button	Function	Old button
	Create a new message	
	Delete message	
	Reply to a message	
	Forward a message	

Complaints against retailer/client

- A message was added to Complaints informing you the complaint was created when you Save.

  Previously, when a complaint was Saved, it was automatically sent to the state WIC office and it disappeared from the computer screen. Staff would enter the same complaint several times because they weren't sure what happened to it when they Saved. The state office would receive multiple copies of the same complaint. This new Success message was designed to stop confusion at the local clinics.

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Help

Important Update! *We have encountered some problems opening the Help files. If you can’t open Help, please be aware that we are working on a resolution. We hope to have Help up and running soon.*

You will find new items in the Help Menu. Online Help has been added to Client Services. This includes:

- **Client Services Help** is still being developed, and you will receive additional Help sections as they become available. If a topic isn’t there, please call the Help Desk with your question. We will try to get your question and the answer into the Problems/Questions section of Help in future versions.

- **What’s New** contains the current release notes.

- **How to Use Help Tutorial** is an interactive demonstration on how to effectively use Help to find answers to your questions.

- **Check in/out Help** provides instructions and assistance for those sites that use Satellite to provide services to remote sites.

- **About Client Services** shows the version you are currently using. You may be asked about the version when you call the Help Desk.

Check In/Check Out

The Satellite program that provides Check In/Check Out services has been updated.

- You no longer need to click a "Start Remote Database" shortcut. The database starts automatically when you logon.

- The database icon now appears in the "System Tray" at the far right side of the taskbar.

A new User Guide is being provided to Check Out sites, and online help has been added to the Help menu in Client Services.

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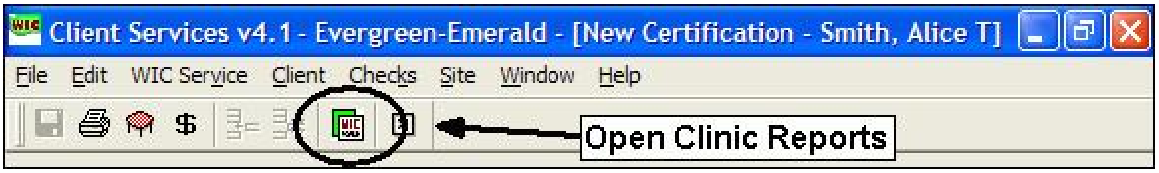
Clinic Reports

The Menu titles were changed slightly.

You can now access Clinic Reports from Client Services through a button on the toolbar (without having to logon again).



Known Issues

1. **Batch Checks.** If Batch Checks are voided using Reconcile Batch Checks, the checks cannot be reprinted through Check Pickup or Batch Checks.
   Workaround:
   A. For each client individually, use the Void/Replace Checks wizard to void/replace or void only the batch printed checks. Note, after using the Void/Replace Checks wizard, you can still reconcile the batch as either voided or issued. The checks remain voided, regardless of how they are reconciled. Once the checks are voided, they can be re-issued using either Batch Checks or Check Pickup.
   B. If the checks were already voided using Reconcile Batch Checks, use the Unvoid Checks wizard to unvoid the checks, then follow directions in A (above).

2. **Appointment Summary Report.** Problems have been reported when using <Ctrl><P> or File>Print to print the Appointment Summary Report. Also, you may encounter problems if you try to print the report for more than one day if you simply type in a new date.
   Workaround:
   When generating and printing the Appointment Summary Report, use the printer icon button instead of <Alt><P> or File>Print. When generating the report for 2 or more days, use the Clear button before changing the day. If you still have a problem printing the report for more than one day, close and re-open Clinic Reports for each day you generate and print the Appointment Summary Report.